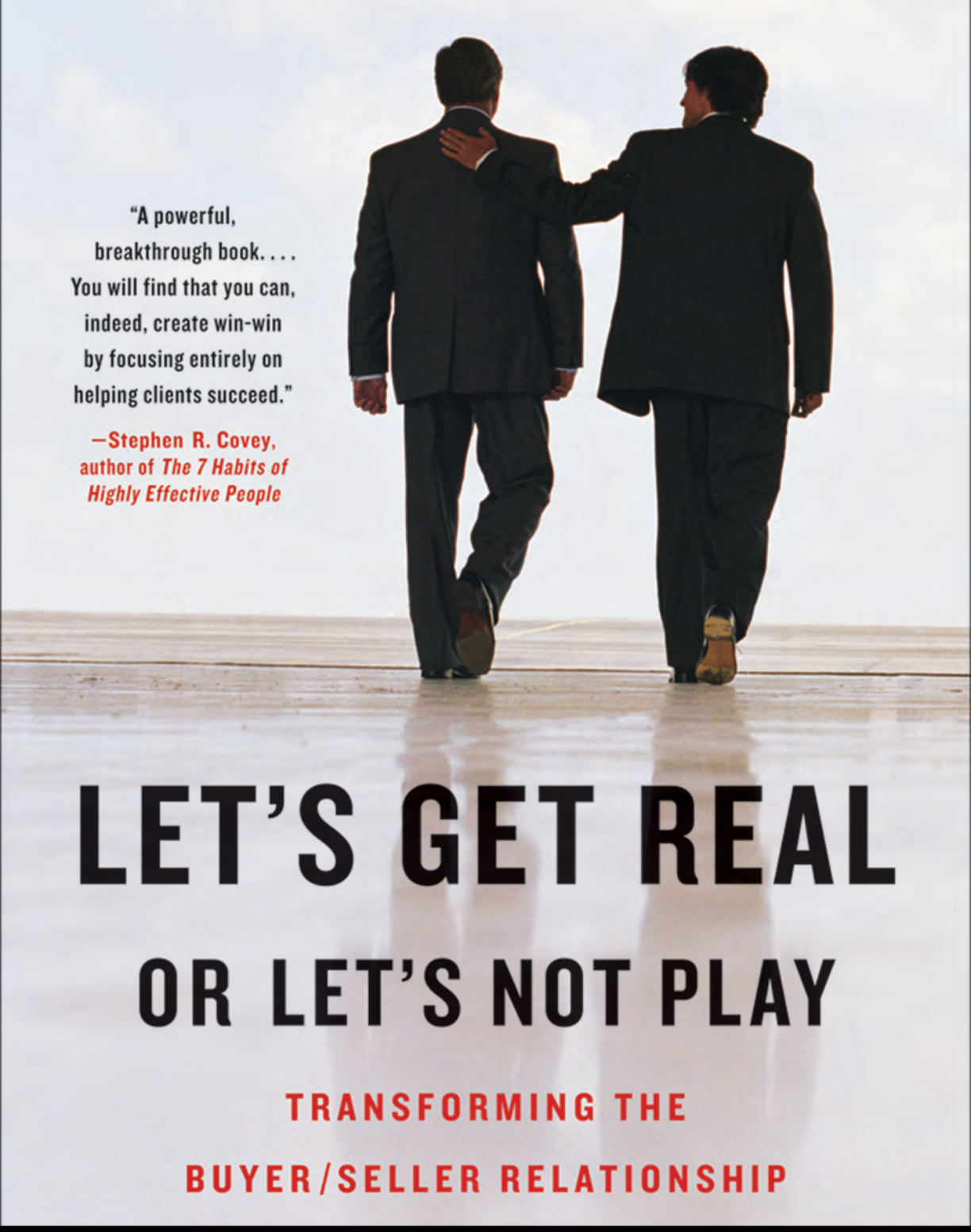

"A powerful, breakthrough book. . . . You will find that you can, indeed, create win-win by focusing entirely on helping clients succeed."

—Stephen R. Covey, author of *The 7 Habits of Highly Effective People*

LET'S GET REAL

OR LET'S NOT PLAY

TRANSFORMING THE BUYER/SELLER RELATIONSHIP

FIRST CHAPTER EXCERPT

FranklinCovey | SALES PERFORMANCE

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Foreword

by STEPHEN R. COVEY

When it comes to sales and growing revenues, companies find themselves under enormous pressure to sell better and faster—and to reach greater levels of performance. On top of that, global competition is fierce and buyers are increasingly savvy, putting pressure on sellers to sell more for less. Faced with this environment, many companies, even the most successful ones, are finding that they can't keep selling as usual—that something has to change for them to preserve their margins, cut down their sales cycles and costs, and grow long-term business partnerships.

I believe the time is well overdue for companies and everyone involved in the sales process—whether it's the CEO, sales manager, or salesperson—to break through dysfunctional selling and buying habits and adopt an entirely new paradigm and framework that will take sales to a higher level.

In *Let's Get Real or Let's Not Play*, you will find a new paradigm for sales greatness along with the habits that will lead you to highly effective selling in a competitive global environment. I believe this book's framework, principles, and how-to instructions provide the necessary process, methodology, tools, and skills for creating and sustaining superior sales performance. There is no other sales book like it, and I have great confidence in its enduring principles for long-term sales success.

I have profound admiration for Mahan Khalsa and how he has, with humility and courage over the years, challenged the old conventions of

buying and selling. In their place, he has created a principle-centered, breakthrough way of helping sellers and buyers bridge their fears and mistrust of one another and break down the many dysfunctional practices that have arisen from this lack of trust. In developing the "Helping Clients Succeed" mind-set, tool set, and skill set central to *Let's Get Real or Let's Not Play*, Mahan has given the business world a powerful, commonsense (yet not common practice) way for sellers and buyers to communicate, think, and act with authenticity, trust, and integrity to reach win-win results.

Mahan's approach says the role of salespeople is to passionately focus on clients to help them succeed. Simply put, the more that salespeople concentrate on their clients' numbers, the more their own numbers go up. Furthermore, if this process takes place in an authentic and competent way, then salespeople are transformed into trusted business advisors in the client's eyes. This, in turn, builds a synergistic partnership for future business, taking sales to a higher level—in both high-integrity, trustworthy, win-win relationships, and increased business opportunities and revenue.

Now, in this book, Mahan and his colleague Randy Illig provide a complete sales process and framework to dramatically raise sales performance and productivity along the entire sales cycle. From filling the pipeline with the right new opportunities, to qualifying and advancing opportunities, and to closing business, sales organizations will find success by following the process in this book. And best of all, they can increase sales today in a way that creates even more sales in the future.

I believe that in *Let's Get Real or Let's Not Play*, sales leaders, teams, or individual salespersons will find the answers to the daily challenges they face. It will help a leader by giving him or her—and thus the organization—the necessary paradigm, processes, and skills to focus not on quick fixes but on principles of enduring sales success. It is critical for the leadership ranks to rethink the way they approach sales and how they manage their teams. Mahan and Randy give sales leaders what they need to build and sustain a sales culture of greatness—one that unleashes the potential of salespeople toward proactively helping clients succeed and, thereby, toward finding their own success and fulfillment, not just in the short term but consistently, year after year.

On the team or individual level, salespeople will find a new way of thinking about their role and how they can dramatically improve their performance. At first glance, many of the principles in this book seem counterintuitive, but they challenge salespeople to look at things differently and grow in their abilities to help clients succeed. Take, for example, "Move off the Solution." Can you imagine a salesperson not chomping at the bit to start talking about his or her solution and how great it is? Yet to have clients feel understood and valued, salespeople have to follow the principle of seeking first to understand, then to be understood. This requires salespeople to talk less and listen more. They can do this by first moving off the solution, asking effective questions, and *listening.*

In *Let's Get Real or Let's Not Play*, salespeople will learn how to create an honest and open environment that allows clients to feel safe enough to share what they think, believe, and value. The trust that is created through this process enables clients to actually partner with salespeople to co-develop a business case and a solution that exactly meets the client's needs in a mutually beneficial way. This is true win-win!

I have no doubt that any salesperson will feel more energized and empowered as they follow the framework provided by Mahan and Randy. Few things are more discouraging to salespeople than not making their numbers. And the more they miss their numbers, the more likely the numbers are raised and the pressure to perform increases. With the mind-set, skill set, and tool set presented in this book, salespeople will find new freedom and enjoyment in their work because they will have a proven way of engaging clients in honest, structured business conversations that help clients feel understood and valued and lead to solutions that produce measureable results.

The role of trusted business advisor is more than anything a key differentiator in our increasingly competitive, global marketplace. Those who can truly understand clients and their business issues, and deliver tangible benefits, are the ones who win more business—better and faster.

Let's Get Real or Let's Not Play is a powerful, breakthrough book. Mahan Khalsa and Randy Illig masterfully put the art and science of influence and sales on new and higher ground. Any organization looking to reengage and renew its sales force with pragmatic, disciplined, commonsense

process and execution will find proven answers in this book. Mahan and Randy prove that you can indeed create win-win by focusing entirely on helping clients succeed—and create a culture of excellence in any sales organization.

This is a must-read and must-practice for anyone in sales and business development. But it is much more than that. I find Mahan's and Randy's principles for effective human interaction, trust building, critical thinking, and execution invaluable for the entire business world.

INTRODUCTION

Sales skills are life skills. What makes us better at sales makes us better in life. And vice versa. As we hone our abilities in sales, we learn to think more clearly and communicate more effectively. We use our time, and others' time, more efficiently. We confront and overcome core human fears. We become more alert and flexible. Life is more engaging and enjoyable.

Likewise, almost all fields of study and areas of experience have meaningful application to sales, whether directly or through the use of metaphors and analogies. Insights and learning that profoundly affect our lives can dramatically increase our sales capabilities.

While many, if not most, human endeavors involve selling at some level, this book is geared toward people involved in business-to-business sales. It is intended for those looking to develop ongoing relationships, versus one-time transactions. In ongoing relationships both buyers and sellers must engage in a symbiotic relationship of mutual satisfaction; otherwise someone is going to want out. It is important to make a sale today in a way that will lead to even more sales in the future.

The material in this book is tilted toward the complex sale, in which there are multiple people, multiple interactions, significant investments, and nontrivial business issues. If you are involved in less-complex sales, you will still find the process and skills found on these pages helpful, although you will likely move through them more quickly and in less depth.

Many businesspeople believe that every person and activity in an organization affects sales—one way or another. We agree. This book's natural audience is composed of those professionals directly responsible for topline growth. Nonetheless, it should prove beneficial, whether your connection to sales is full-time or part-time; whether you are already successful or on your way; whether you are experienced or new to the endeavor.

DEFINITION OF TERMS

There are a few terms used throughout the book that warrant some clarification upfront.

Sales: We think of sales as the process of helping clients succeed in a way they feel good about. To us, helping clients succeed is not a euphemism for sales—it is the essence of sales.

> ❖ One thing we've discovered with certainty is that anything we do that makes the customer more successful inevitably results in a financial return for us. —*Jack Welsh*

Client: We use this term to mean anyone whom we are trying to help succeed. The client can be either current or potential. The client can be internal or external to an organization. The client can be multiple people, and often is.

For our purposes, client and customer are synonymous. For consistency, we use the term client throughout the book. If, in your world, the term customer is more common, please use that in your mind as you read.

Consultant: We use the term consultant to mean anyone trying to help a client succeed. A consultant can be a salesperson, business developer, advisor, technical or professional consultant, or a friend. Please read into the word "consultant" a meaning that is appropriate for you.

Getting "real": This is a subjective term, used in this book to mean being authentic, being truthful, saying what we mean, being congruent with what we value. Getting real involves challenging lazy thinking and penetrating façades, games, defenses, fears, and illusions. We open belief systems to examination. We get to the heart of the matter.

Exact Solution: No solution is perfect. We get closer and closer, but never get there completely. We use the term "a solution that exactly meets

the client's needs" to represent a solution that is not more than the client needs, nor less than what is possible. It is a target rather than an absolute. It also happens to be the "E" of the ORDER acronym, which is the key organizing model in the book.

❖ It is reasonable to have perfection in our eye that we may always advance toward it, though we know it can never be reached. —*Samuel Johnson*

AWARENESS AND CHOICE

There is no ultimate sales methodology or one right way of doing things. If what you are currently doing is getting you the results you want, keep doing it. This book offers additive options rather than necessary imperatives. Take what you find useful and leave what you do not need. Our goal is to augment your awareness of what is possible to accomplish in sales dialogues, and to increase your choices for succeeding in a way that benefits both you and the client. Increased awareness and greater flexibility translate into greater success and enjoyment.

WHY BOTHER TO READ THIS BOOK?

A tremendous opportunity exists to radically increase the success and satisfaction of both buyers and sellers. There are much more productive ways to find a good fit between what buyers truly need and what solution providers do well. It is worth the effort. With a good fit, both parties win. With a bad fit, both lose.

Unfortunately, many buyers feel that salespeople try to force or coerce a fit. No matter what you put in front of the word "selling" (consultative, solution, visionary, creative, integrity, value-based), it is still tainted with the association of a person doing something *to* somebody, rather than *for* or *with* them. Even talented and ethical sales professionals can be judged guilty until proven innocent.

As it has evolved, the sales relationship has often become a fear-based relationship. Rare is the client who has not felt abused by a salesperson through manipulation, dishonesty, or incompetence. As a result, many

clients fear that a salesperson will talk them into something that is not really right for them, that does not meet their needs or create value. They fear they will overpay or be persuaded to make foolish decisions. Poor purchasing decisions can affect their jobs and the fates of many people in their organization. Clients may suspect that salespeople won't really understand their business, that they will be ignorant, arrogant, and elusive. They worry that precious time will be wasted.

Salespeople, on the other hand, may fear they won't make the sale. If they "lose" enough sales, they won't make quota, they won't get paid well, and they won't meet their own needs or those of the people important to them. Salespeople have also learned that many requests for their involvement are not sincere, that the client has no intention of hiring them. Perhaps the client wants to check out prices and see what is happening in the marketplace. Perhaps the client has already decided who they are going to hire, but they are required to have three additional bids. Some clients have no qualms whatsoever in having solution providers invest huge amounts of time, people, and money with no real expectation of having a working relationship.

Dysfunctional buying practices have arisen to combat dysfunctional selling practices. For instance, buyers may send out Requests for Proposals (RFPs) that, under threat of pain and death, refuse to allow any human being to talk to any other human being. When buyers do not trust sellers, they hide and protect vital information and restrict personal contact. Sellers have to guess what would actually work for the client, and often guess wrong. This reinforces the perception that sellers can't be trusted, and dissatisfied buyers then create even higher hurdles. Sellers acquiesce and either go along with things that do not make sense, try more outlandish gambits, or choose to withdraw.

Buyers hate having their time wasted yet are all too willing to waste sellers' time. Sellers are asked to fill out pages of questions, whether they seem relevant or not. Sellers are asked to make large, up-front investments of time and energy, and to reveal proprietary knowledge with no reciprocity from the buyer. Buyers' current problems have been developing over years, yet they want sellers to propose a solution in two weeks. Some clients have concluded that they do not have to pay for services. They put out an RFP to five or six companies; they have each one explain at length what they

would do and how they would do it; they then take the best of what they heard and do it themselves. Presto—free consulting!

Buyers express the desire for "fairness," a "level playing field," and the ability "to compare apples to apples." Yet, in requiring formulaic responses to the RFP, buyers may unwittingly enforce a conformity that results in sterility and a lack of creativity and innovation, and which eliminates potentially good alternatives. Buyers may ask sellers to agree to one-sided, onerous terms and conditions as a prerequisite for merely responding to the RFP. Excellent solution providers may even choose not to respond. It can eliminate intelligent and creative negotiation that could serve both parties.

So again, why bother to read this book? Because collectively we can make a difference. We can replace dysfunctional *selling* practices with attitudes, skills, and processes focused on helping clients succeed. We can transform dysfunctional *buying* practices into those that serve clients more appropriately. We can promote an environment where buyers and sellers talk honestly and openly, then jointly make intelligent decisions about whether or not it makes sense to work together. If it does *not* make sense, let's find out quickly, shake hands, and part friends. If it *does* make sense, let's have some fun, do good things, and make some money.

SAYS WHO?

While grounded in research, this book emanates from the authors' direct experience. We both are responsible for initiating and developing accounts with multiple Fortune 500 companies. We coach and consult with clients in the field. Along with our colleagues, we have positively influenced billions of dollars of sales; we benefit from a great number of repetitions in a field where success, or the lack thereof, is unmistakable. Both of us have held CEO and other leadership positions, providing perspective beyond the sales arena.

"If you want to learn something, teach it." The content of this book has been taught to demanding audiences in over forty countries and in nine different languages. We do what we teach and teach what we do. When something works, makes sense, and is consistent with core values, we apply

it. If it continues to work, we reinforce, repeat, and reward. If it does not work, we rip apart, reevaluate, and replace. What is in this book has been thoroughly tested and has served both buyers and sellers extremely well.

HOW THIS BOOK IS ORGANIZED

There are four major sections in the book. "Key Beliefs" lays out underlying premises upon which the rest of the book's content is based. The next sections are "Qualifying," "Winning," and "Initiating." Initiating is placed *last* in this book even though it may come *first* in a sales cycle. This placement is for learning purposes; when you reach the Initiating section, you will have all the skills and abilities described in Qualifying and Winning, thus allowing you to initiate effectively. Initiating new opportunities with strangers is challenging; the task is easier when a broad array of choices is available.

The following provides a quick sense of what each of these three sections entails.

Qualifying: Should we keep talking?
How do both we and the client make intelligent decisions about whether or not to invest energy and resources in an opportunity?
Winning: Should you do this with us?
How do we effectively advocate for a solution that precisely meets the clients' needs? How do we enable good decisions in the client's best interests?
Initiating: Should we be talking?
How do we develop opportunities from scratch, in a way that both we and the client can feel good about?

This book is an overview, not an encyclopedia. In every single aspect, a deeper experience is available. While some exercises for acquiring and applying skills are included, this book is not a substitute for a training course; training courses are not a substitute for working together in the field. If the overview here resonates and you want to explore further, give the authors a call. It's a good way to see if we walk our talk.

CHAPTER ONE

KEY BELIEFS

Every sales or decision-making methodology has underlying assumptions and beliefs. Sometimes they are clearly stated and sometimes they are not. We base our methodology on the following premises:

1. Consultants and clients want the same thing.
2. Intent counts more than technique (and technique is still important). *Corollary:* You are more successful when you concentrate on the success of others rather than on your own.
3. Solutions have no inherent value.
4. Methodology matters.
5. World-class inquiry precedes world-class advocacy.

KEY BELIEF NO. 1:
Consultants and Clients Want the Same Thing

There is a level at which consultants and clients share identical, mutual self-interests. Both want a solution that exactly meets the clients' needs. If clients do not perceive they are getting a solution that meets their needs, they can choose to do nothing or go somewhere else. If enough clients make either choice, consultants start hurting.

It can be even worse for you if clients *do* buy your solution and *then* discover that it does not meet their needs. In that case, you can spend all of your profits (sometimes more) trying to make it right. If you can't make it right, you have an unhappy, nonreferenceable client. Sometimes you spend the effort and money to make it right and still end up with a dissatisfied and disenchanted client. Furthermore, the Internet makes it easy for buyers to widely broadcast their experiences—whether positive or negative. The authors have worked with companies that have lost hundreds of millions of dollars on sales they wish they had never made. Consultants clearly lose when clients think they are not getting a solution that truly meets their needs.

Clients lose as well. If they do not buy a solution, all the problems they were hoping to resolve go unsolved. All the results they hoped to achieve are not attained. If they do buy a solution and it does not meet their needs, they waste a great amount of money and time in the solution-acquisition and implementation processes, and still forgo the expected economic benefits. With each additional attempt to create a solution, both consultants and client sponsors are met with exponentially more cynicism and resistance, and less likelihood of success.

Buyers and sellers both want a solution that meets the client's needs exactly. We both win if we get it; we both lose if we do not. That is the good news; knowing we both want the same thing makes the task easier.

The bad news is that clients do not consistently get a solution that meets their needs. Even though both of us want it, even though we both lose if it does not happen, we both often engage in counterproductive behaviors. Let's increase our awareness of those behaviors as a prelude to building better choices.

Dysfunctional Behaviors of Consultants

When we ask consultants what *they* do that inhibits arriving at a solution that completely meets the client's needs, here are some of the things they tell us:

"We don't listen."
"We make assumptions."

"We don't talk to the right people."
"We think we know what they need better than they do."
"We try to fit their needs into our solution."
"We need to make the sale."
"It takes too much time."
"We don't understand their business."

Dysfunctional Behaviors of Clients

What about the clients? They want a solution that meets their needs, yet they also exhibit counterproductive behaviors and actions that get in the way. Common consultant complaints about clients include:

"They don't know what they need."
"They can't articulate what they need."
"They don't agree on what they need."
"They won't give us good information."
"They don't let us talk to the right people."
"They are unrealistic about the time, money, and people needed."
"Politics and personal issues count more than business sense."
"They procrastinate."
"They won't make decisions."

If we keep focusing on a solution that exactly meets the client's needs, it will organize and guide our behaviors toward a common goal. It becomes a touchstone against which we can test all requested actions. Whenever we request something of the client, or they ask something of us, we examine whether that effort will take us closer to, rather than farther from, a solution that exactly meets the client's needs.

Concentrating on common interests—what we both want—does not eliminate the possibility that we and the client will have interests that differ, or even conflict. For instance, when it comes to creating value for the client—making the pie bigger—we and the client want the same thing: a bigger pie. When deciding how much to *pay* for the increased value (dividing up the pie), our self-interests may diverge; each party may feel they

deserve more of the pie. Most people find that making the pie bigger makes it much easier to negotiate a meaningful slice. If we do not have a solution that meets the client's needs, there may be no pie to divide.

KEY BELIEF NO. 2: Intent Counts More Than Technique (and Technique Is Still Important)

If you are going to help your clients succeed, you will need good information from them. To get that information, you will ask questions. Your clients will decide how much information to disclose based largely on their perception of the intent behind your questions: Are you asking questions to help *them* get what *they* want in a way *they* feel good about, or to help *you* get what *you* want in a way *you* feel good about? If they give you information, can they trust that you will use it *for* their interests and not *against* them? Many clients make these judgments instinctively, at a subconscious level. Nonetheless, you can influence those judgments.

❖ Who you are stands over you and thunders so I cannot hear what you say. —*Emerson*

There is an old maxim: "People don't care how much you know, until they know how much you care."

Building Trust

In his book *The Speed of Trust*, our friend and former colleague Stephen M. R. Covey details and demonstrates two key points:

1. The degree of trust has hard economic consequences: as trust goes up, speed goes up and costs go down. As trust decreases, everything slows and costs rise. (Most of us understand this intuitively; Stephen backs it up with evidence.)

2. You can build trust on purpose. Earning trust is a skill that you can learn and improve. It need not be left to good luck, circumstance, or hope.

We describe trust as follows: Trust = Intent + Expertise. Clients must trust that your intent is compatible with their best interests, and that you have the expertise to design and deliver a solution that meets their needs. For most consultants, how you can increase your expertise is far more clear than how you can improve clients' perception of your intent. Yet if clients do not feel comfortable with your intent, they may discount your expertise.

A client will assign to you an intent whether you want them to or not. The intent they assign to you will have a large impact on the quality of your dialogue. If your intent is not crystal clear to you, it will not be clear to the client.

We highly recommend that you write out an Intent Statement and develop the ability to act congruently with that intent, even under pressure. A good exercise for clarifying intent is provided in Appendix Two.

Corollary: You Are More Successful When You Concentrate on the Success of Others Rather Than on Your Own.

> ❖ The intention behind an action determines its effects, every intention affects both us and others, and the effects of intents extend far beyond the physical world. . . . It is, therefore, wise for us to become aware of the many intentions that inform our experience to sort out which intentions produce which effects, and to choose our intention according to the effects that we desire to produce.
>
> *—Gary Zukav, The Seat of the Soul*

When people feel they are being manipulated or led to *your* conclusion rather than to their own, they will often move aggressively in the opposite direction. This behavior is called reactance, or polarity response. The irony with reactance is that the harder you try to "sell" people, the less likely it is to happen. People feel their choice is being restricted and they become highly motivated to subvert the limitation. It is an emotional response. When trust is compromised, information flow is severely curtailed, and you are far less likely to craft a solution they feel meets their needs. Conversely, when clients perceive that your intent is to help them succeed, they are more likely to share their beliefs about what that success is. The better you understand what the client wants and needs, the better the choices you

can bring to the table. It is in your own best interest to focus on the interest of the client first.

❖ The moment there is suspicion about a person's motives, everything he does becomes tainted.

—Mahatma Gandhi

Some part of us understands this dynamic. Yet we often feel pressured to meet our personal and organizational revenue goals. Our intent becomes "Meet the goals! Make the sale!" Perversely, the harder we try, the worse we do. When we lose sight of helping our clients succeed and instead focus on our own success, clients perceive the difference negatively. Please remember: *The more important it is to meet* your *numbers, the more important it is to stop concentrating on* your *numbers and start concentrating on the* clients' *numbers.*

We are more successful when we concentrate on the success of others rather than on our own. This is not a platitude. It is something the authors know from experience. We have sold to survive ("I've got to get some sales"), we have sold out of ego ("I can get them to do this"), and we have helped clients succeed. We know the difference in our hearts, minds, and guts. Helping clients succeed not only feels better, it is tremendously more effective.

❖ The more important it is to meet your numbers, the more important it is to stop concentrating on your numbers and start concentrating on the client's numbers.

Helping clients succeed is not an attempt to be nice; it is not philanthropic or selfless. It is a powerful, if paradoxical, means of getting what we want.

Technique Is Still Important

Clearly, technique is important. You could be the most well-intentioned person in the world, a fine human being, yet if you have no communication skills—no critical-thinking tools—you will not be successful. A good portion of this book deals with technique. If that technique does not serve your intent, and if that intent does not serve the people you are working with, everything else will be jeopardized.

KEY BELIEF NO. 3:
Solutions Have No Inherent Value

Consultants often deal in foregone solutions. We tend to think everyone needs what we have, that our solution has universal application. However, solutions derive value only from the problems they solve *that people care about,* and/or from producing results *that people highly value.* Solutions must solve something. If there is nothing the client wants to solve, there is no value to the proposed solution. Understanding this axiom guides everything we do with clients.

Consultants are often eager to tell their clients, "The solution to your problem is . . ." Let's take a moment and examine that short phrase. Before reading further, take a couple of minutes and write down the assumptions contained in the phrase:

"The solution to the problem is . . ."

Did you come up with some of the following assumptions?

- The problem is real; it exists; it has not gone away or was not an illusion. Likewise, a solution exists that solves the problem.
- There is only one problem. There are not multiple problems or several different problems intertwined. Likewise, there is only one solution.
- People care about the problem; they want a solution.
- The problem is a priority relative to other problems.
- We can measure the extent of the problem.
- It is possible to determine if the solution is valid.
- Different people perceive the problem the same way.
- The solution would solve the entire problem.
- The cost of the solution is meaningfully less than the cost of the problem.
- The solution would not cause more problems, or a worse problem.

- The solution will be valid over time.
- The solution can adapt to changing circumstances.
- The solution can and will be applied to the problem.
- Someone is willing and able to allocate sufficient resources to address the problem.

You could do the same exercise, with similar conclusions, using the phrase, "The solution to the opportunity is . . ."

❖ Solutions have to solve problems that people care about or produce results people highly value.

How you sell is a free sample of how you solve. It does not demonstrate good critical thinking skills if you are willing to talk about a solution without examining some of the assumptions listed earlier. Yet consultants do so a large percentage of the time. When you start talking about a solution before understanding what it is supposed to solve, you decrease client confidence, lessen your credibility, and significantly reduce your ability to produce an exact solution.

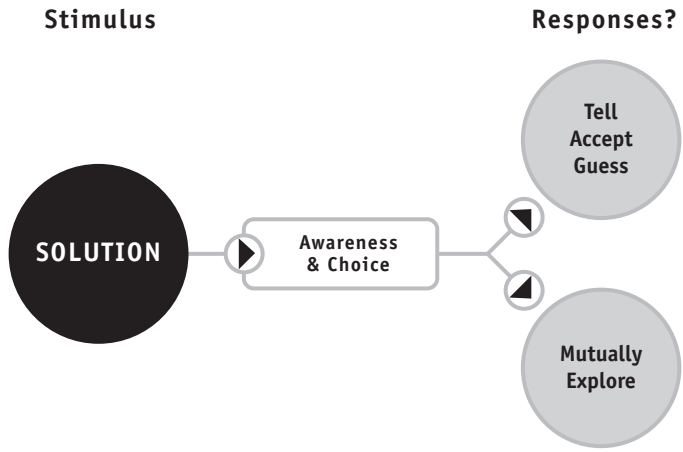
A Mutual Conspiracy

There is a mutual conspiracy between client and consultant to talk about the solution early on. We love talking about the solution. It is our comfort zone. We understand it, we know it, it's about us, it's our solution, and it's really great. What about clients? They like to believe there is a magic formula—that they can throw some money at the situation and everything will be okay. It is easier to talk about a solution than to do the critical spadework to uncover the issues the solution is supposed to resolve; to find evidence that proves they have a problem; to develop measurements for success; to explore systemic implications; to identify and overcome constraints. In addition, as long as the solution is the topic of discussion, clients can put all the pressure on you; they can sit back and watch you sing and dance.

Move Off the Solution

Top professionals have the ability to "move off the solution." They withhold offering a solution until they have intelligently explored the problems to be solved and/or the results to be achieved. They organize their questioning to get meaningful answers to critical assumptions. They do so in a way that is comfortable, conversational, and time-efficient. When done well, clients gain insight and understanding of their situation.

In the section entitled Initiating, we discuss how to move off our *own* solution, and in the Qualifying section, we talk about how to move off the solution the *client* proposes. Because of the "mutual conspiracy" to talk about the solution, moving off the solution requires that consultants exercise considerable discipline and communication skill.



The Big Marshmallow

In his book *Emotional Intelligence*, Dr. Daniel Goleman refers to a remarkable study conducted by Walter Mischel during the 1960s at a preschool on the campus of Stanford University. He took children who were about four years old and put them in a room alone with a marshmallow on the table. The researcher would tell the child he or she could have the marshmallow, but if the child could wait while the researcher ran a quick errand, he

would bring back two marshmallows. For a child, that is a pretty good return on investment.

The researcher would then leave the room; the child was surreptitiously filmed. Some of the kids had no restraint. The idea of waiting to eat that marshmallow was way beyond them; they grabbed the marshmallow and ate it. Some of them nibbled the marshmallow, taking a tiny bite, then another, and pretty soon the whole marshmallow was gone. Some of them would agonize as they walked around the room, staring at the marshmallow, sniffing it, even licking it, but they would not eat it. Some even tried taking naps to avoid the dilemma.

The researchers then followed these children over a fifteen-year period. The kids who had the patience and discipline to not eat the marshmallow when they were in preschool were more successful emotionally and intellectually, regardless of their chosen pursuits.

Similar results occur with business developers and consultants. The client may put one requested solution on the table. If the consultant can resist the impulse to talk about that solution (the adult version of the marshmallow) and instead ask effective questions that investigate what the solution is meant to solve, he or she is often rewarded with multiple opportunities for success.

❖ Move off the solution!

One of the hardest behaviors to overcome is the tendency to immediately go for the first solution. Consultants who can resist the immediate solution are more successful.

Move off the solution!

KEY BELIEF NO. 4: Methodology Matters

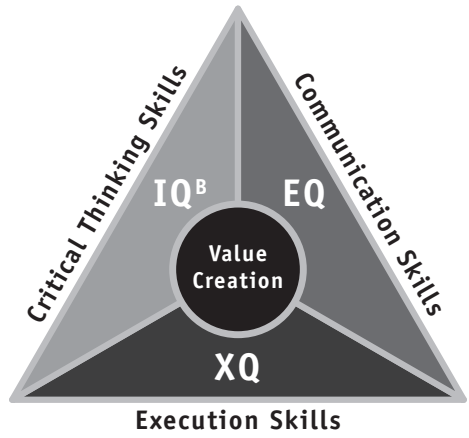
There is no one way to help clients succeed.

There are, however, critical thinking skills which greatly aid our diagnosis of and prescription for business challenges. We refer to these skills and principles collectively as the business intelligence quotient (IQ^B or, simply, IQ). How intelligently can we uncover where and how value is cre-

ated in an application, function, process, unit, organization, or economy? How critically can we examine our beliefs? How much intellectual rigor can we apply to our analysis? Good IQ helps us clarify and test our assumptions and mental models, balance our gut instinct with data, gather evidence and impact for key issues, confront critical constraints (past, present, and future), and apply good tenets of systemic thinking.

There are communication and relationship skills that significantly enhance the quality of client/consultant interactions; we refer to those skills as principles of emotional quotient (EQ). How well can we create a container of safety and trust, where clients feel free to share what they think, feel, and believe to be true? How comfortable do clients feel with us examining and exploring their beliefs? How much information will they share? How willing are they to give us access to key stakeholders?

Finally, there are process and execution skills that save time, increase productivity, leverage resources, and eliminate non–value added effort; we refer to these as execution quotient (XQ). Can we execute a consistent, repeatable, flexible process that works better for both clients and consultants? Can we build feedback loops into the process which allow us to continually improve?



For top-performing consultants it is the *fusion* of these skill sets that puts them at the pinnacle of their profession. They seamlessly blend IQ, EQ, and XQ.

Intellectual Piranha Versus Warm and Fuzzy

Mahan once interacted with one of the world's top strategy consulting firms. Their consultants would eat, drink, and sleep IQ. Some of their own clients described them as "brains on a stick." In their meetings, when they would throw an idea on the table, it was like watching piranhas feed. They would attack and devour the idea, tear it apart, and if anything was left at the end they would say, "Oh, must be a good idea." For them it was a valid form of critical thinking. The problem was that when they tried to use the "piranha process" with their clients, their clients found it tremendously arrogant and obnoxious—and probably intimidating. What worked well as an internal paradigm transferred poorly to external situations; there was little flexibility to adapt styles to differing requirements. This inflexibility proved a serious challenge as the firm decided to make implementation a major plank of their own strategy. Clients would put up with them for two or three weeks, maybe even for two or three months, but rarely for two or three years. They had to significantly stretch their EQ to help their clients (and themselves) succeed.

We've also worked with companies that were much higher in EQ than IQ. One company in particular had an incredible ability to develop rapport and trust with clients, and they backed that ability with quality content; yet they lacked the intellectual horsepower to really connect their services to business results. This was a serious limitation in helping clients succeed and thus impeded their growth potential. To truly help clients succeed, both IQ and EQ are necessary. Lack of either is a fatal flaw.

It is helpful to organize these skills into a repeatable methodology (an XQ) that makes explicit our beliefs about the IQ and EQ abilities that are most effective in increasing profitable revenue. Those beliefs can then be tested in the "real world." With the appropriate data and anecdotal feedback, we can assess the following:

Is what we are doing producing the results we want?
If so, reinforce, repeat, reward, and improve.
If not, is it because

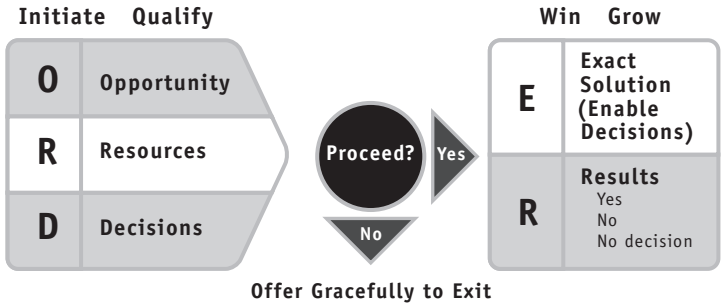
- we are not actually applying the methodology? (Increase application.)

- we are not applying the methodology skillfully? (Increase skill.)
- the methodology is faulty? (Rip apart, reevaluate, and replace.)

The ORDER Methodology

Methodologies can help us take a complex (sometimes even chaotic) series of events and processes and represent them in an understandable, repeatable, and transferable way. They can help integrate sophistication with simplicity. If it is too sophisticated it will not be used, and if it is too simple it will not make a difference. Many business development methodologies tend to emphasize completeness and thoroughness over ease of adoption and application. They are very good but rarely used, and thus are not as helpful as they could be.

The ORDER methodology is an abstract of how people develop business at a high level of expertise. The "what" of the model—its fundamental premise—stays consistent throughout the global economy. The "how"—the way in which people apply it—changes considerably among countries, cultures, cities, industries, solutions, and personalities.



Following is a brief overview of the ORDER methodology and its key components. The rest of this book examines each component in detail.

Opportunity: Should *they do it?*

You cannot help someone succeed who has no perceived needs or wants. No pain, no gain, no opportunity. You can develop a mutual understanding of an opportunity by examining the following:

Issues: What problems or results is the client trying to address? In what priority?

Evidence: How do we define the problem? How do we measure success?

Impact: What are the financial and intangible costs and benefits?

Context: Who or what else is affected by the issues and the solution?

Constraints: What has stopped (or might stop) the organization from resolving these issues?

Resources: Can *they do it?*

Even if there is a substantial opportunity, you cannot help someone succeed who has insufficient resources. You must examine:

Time: When are they hoping to see the results in place?

People: Which people resources are they willing to commit?

Money: What level of investment is appropriate for the desired results?

Decisions: How *will the decision be made, and by whom?*

Even if there is a substantial Opportunity with sufficient available Resources, you cannot help someone succeed who cannot or will not make a decision.

To understand and influence how decisions will be made, it is helpful to codevelop the following with the client:

The Decision Process

Steps	Decision	When	Who	Criteria/ Beliefs
What are all of the steps?	What decision gets made in each step?	When will they decide?	Who is involved in each step	How will each decision maker decide?

Competition: How will they decide between alternative solutions?
Gain/Loss: Who in the organization stands to win or lose if this solution is adopted?
Personal Stake: How does the person we are talking with win or lose?

Exact Solution / Enable Decisions: Will they do it with us*?*

- What is our solution? Given the client's situation, what are the reasons that adopting our solution makes sense?
- How can we effectively advocate for our solution and enable good decisions?

Results: Will they do more *with us?*

In response to our presentation, our client will say yes, no, or make no decision. For each of those responses there are actions that are helpful to ensure a positive and productive ongoing relationship.

Yes: How do we deliver and measure the desired results? How do we build and grow a value based relationship?

No: How do we learn and improve through understanding where our solution did not meet the client's needs better than other options?

No decision: How do we co-develop a means for the client to feel comfortable making an explicit, concrete decision—either Yes or No?

ORDER is depicted in a linear fashion. In practice it is applied in an iterative way. The information that comes from ORD is often developed over many conversations, like fitting pieces into a puzzle over time. Even though there is a logical progression of ORD before ER, elements of ER will enter into our ORD discussions.

The better the job we do with ORD, the higher the probability of success in ER. If there is not a qualified opportunity, with sufficient available resources, and if there is not a clearly defined decision process with access to the people we need to see, then neither our client, nor we, have earned the solution.

Some competencies, skill sets, and mental models for ORD are different than those for ER:

Opportunity—Resources—Decisions	Exact Solution / Enabling Decisions—Results
• *Divergent thinking:* developing multiple issues; considering many possibilities; talking to many people; systemic thinking	• *Convergent thinking:* driving to a decision; resolving issues and concerns; implementation; measurement; continuous improvement
• *Inquiry:* seeking first to understand	• *Advocacy:* seeking to be understood
• Understanding *effects* of problems	• Understanding *causes* of problems
• *Deciding* fit	• *Executing* fit

Evolution of ORDER Over the Sales Cycle

Initiating: Should we be talking? (Filling the pipeline)

When we initiate a dialogue with a prospective client, we prepare both to *Ask* and to *Offer.*

- *Ask:* A process of inquiry to allow the client to set the agenda.
- *Offer:* Some reasons we feel it would make sense for the client to invest time speaking with us. Those reasons are based on a set of educated guesses about a potential Opportunity, which indicate a potential relevance of our solution(s) to the client's situation.

Qualifying: Should we keep talking? (Advancing the pipeline)

We are in the qualifying phase when:

- a client initiates the conversation, or
- a client reacts with interest to something we initiate.

We qualify by talking about Opportunity, Resources, Decisions, and testing possible elements of an Exact Solution.

Roadmap	Initiate	Qualify	Win
Opportunity			
Issues			
Evidence			
Impact			
Context			
Constraints			
Resources			
Time			
People			
Money			
Decisions			
Process			
Access			
Criteria/Beliefs			
Alternatives			
Exact Solution			
Solution			
Deal Structure			
Enabling Decisions			
End in Mind			
Key Beliefs			
Proof/Action			
Questions			
Yellow Lights			
Next Steps			
Results			
Yes			
No			
No Decision			
Relationships			
Who			
How			

Winning (Delivering the pipeline)

Our proposed solution should be able to:

- enable the Opportunity
- utilize the available Resources
- match the Decision Criteria/Beliefs of key stakeholders
- exceed their alternatives

For those who like to get the big picture before diving into the details, there is a roadmap to "Helping Clients Succeed" on page 23.

KEY BELIEF NO. 5:
World-Class Inquiry Precedes World-Class Advocacy

Successful business development is a balance between inquiry and advocacy. Stephen Covey's sixth habit of highly successful people, "Seek first to understand—then to be understood," applies to highly successful business developers. Skilled inquiry produces *mutual* understanding: we better understand what the client truly values; the client gains better clarity of his/her own situation and possibilities; the client *feels* understood. The better job we do of eliciting the client's story, the more able we are to match it to ours.

> ❖ The only way to influence someone is to find out what they want and show them how to get it. —*Dale Carnegie*

Most people know how to ask questions and hear what others are saying, yet few are consciously competent at developing a high degree of mutual understanding. They lack either a powerful methodology of questioning, the ability to truly listen with all their senses, or both, often while thinking that this is surely not the case.

Consultants commonly resort to three traditional approaches to interacting with clients:

1. We Tell.

When inquiry and advocacy are out of balance, the tilt is almost always toward advocacy. "Telling" is not always bad. Sometimes trusted business advisors help their clients cut through fear, uncertainty, and doubt by strongly advocating what the client must do. We always have telling as a choice. Telling, however, has a low probability of producing a solution that clients feel exactly meets their needs.

The downside of tilting toward advocacy includes:

- What we choose to tell is not interesting or relevant to clients. We waste their time and ours, and reduce the desire for more interaction.
- What we tell them to do might be wrong. (It is at least a statistical possibility.)
- There may be no buy-in or ownership from the client, which could cause failure of either the sale or the initiative.
- They see us as arrogant, ignorant, or both.
- We potentially leave huge amounts of money on the table by telling about one opportunity when asking could have produced many more.
- We lose the ability to match our story to the clients', to speak their language, to address their priorities, to foresee and counteract pitfalls early, and to build trust through understanding.

2. We Accept.

Clients tell us what they want, and we propose to give it to them. Easy, isn't it? Obviously, accepting what clients want is not always bad, particularly if we agree with them. Yet how often do we propose a solution based on what the client said he wanted, and the client either feels it misses the mark, chooses to do nothing, or chooses a competitor whose solution is different than what he asked for? How many times have we won the engagement, given clients what they said they wanted, and still ended up with an unhappy client?

The downside of passively accepting includes:

- The client could be wrong—and will still blame us—sometimes with severe consequences.
- We have not demonstrated any thought leadership.
- We may not understand exactly what we are solving or how to measure success.
- We could leave many opportunities uncovered.

3. We Guess.

Of course, we consultants do not like to call it guessing—we call it diagnosis, assessment, analysis. Yet, if one didn't know better, it would look a lot like guessing. One or two consultants talk to one or two client counterparts for an hour or two. Based on that, they start guessing: What do we think they really need? What do we think the actual problems are? Why haven't they fixed this before now? What should we propose? Do you think we were talking to the right people? Do you think they have any money to pay for this? How much should we charge? Who do you think the competition is? And so on.

Consultants, being the intelligent people we are, have formalized the guessing process; we call it a proposal. And you can always tell how much we are guessing: the more we guess, the longer the proposal. As the cost of face-to-face business development keeps climbing, the cost of guessing becomes enormous.

A Fourth Approach: Mutual Exploration

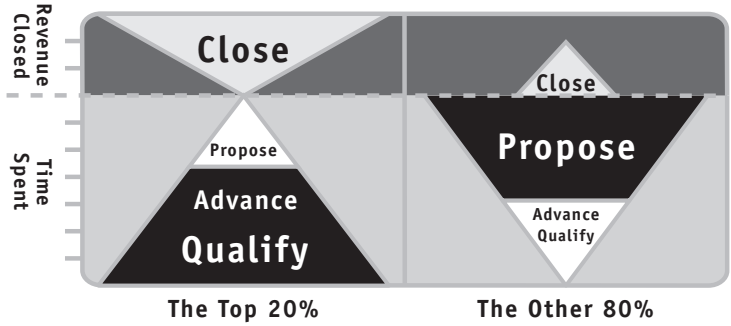
There is a fourth option: we mutually explore with clients a solution that truly meets their needs—whether they eventually get that solution with us or with someone else. Of course, this is not easy. Clients have come to expect that we will tell, accept, and guess. Even worse, they may try to force us to tell ("You're the expert"), accept ("Just give us what we want"), or guess ("It's all in the RFP").

Mutual exploration has two imagined downsides. First, it would appear to take more time. However, the authors assert that mutual exploration does not take *more* time; it just uses time differently, and more effectively.

Do we *tell*, do we *accept*, do we *guess*, or do we *mutually explore*?

If we do not have a solution that meets the client's needs, it is more time-effective (and cost-effective) to find that out early rather than late. Which leads to the second imagined downside: that we may find we do not have a solution that truly meets the client's needs, and thus "lose" a sale. Yet we cannot lose something we never had; the probability of selling them something if it does not meet their needs is low. Even if they do buy it and only afterward are displeased, we still "lose." Thus, the authors contend we can get the upsides of mutual exploration while turning the perceived downsides into advantages.

What TOP Professionals Do That Others Don't



Don't present to open, present to close!

This book is dedicated to mutual exploration and to the goal of a solution that truly meets the client's needs. It may not happen every time, but it definitely can happen far more often than it does now.

FranklinCovey | Sales Performance Practice

At FranklinCovey, we have a simple sales philosophy: the more you focus on helping your clients succeed, the more you will succeed.

We show our clients how they can dramatically increase profitability by becoming totally client-centered and helping their clients succeed.

At the core, what we do is help sales professionals learn how to consistently execute a consultative sales methodology. The process balances the person-to-person and communication skills with critical thinking skills and a laser-focus on execution. This process enables buyers and sellers to truly connect as business partners.

With Helping Clients Succeed™, buyers get exactly what they want in a way they feel good about while sales people are able to shorten their sales cycles, grow their accounts, close more deals, improve margins, and win more loyal clients.

Our Training Suite

We provide customized sales training, consulting, and coaching to help dramatically improve and sustain sales. We specialize in helping organizations sharpen their sales execution and reinforce sales leadership and individual sales skills. We help sales teams initiate and qualify opportunities, win deals, and grow revenues through a process of assessment, development, execution, and measurement.

For more information, visit:
www.franklincovey.com/salesperformance